

NAVIGATE: MAPPING YOUR BENEFITS PROCESS

>> THE NAVIGATION SCORECARD

To help us more clearly understand your current situation and make the most of your time in our Discovery session, we request that you complete **The NAVIGATION Scorecard**. Please review each pair of phrases and then check the number that most closely reflects your feelings on each topic.

A	The communication and education efforts related to our benefit plans is inconsistent and doesn't thoroughly educate our employees on how the plan(s) work	1	2	3	4	5	6	7	8	9	10	The communication and education related to our benefit plan(s) is streamlined, comprehensive and consistent at open enrollment as well as with new hires
B	Our employees do not perceive the value of the benefits we provide	1	2	3	4	5	6	7	8	9	10	Our employees perceive great value in the benefits we provide
C	We have not been successful in educating our employees regarding cost containment measures or how to become a better consumer of healthcare	1	2	3	4	5	6	7	8	9	10	Our employees have a good understanding of how to keep costs down while still receiving quality care
D	From the financial reporting that we receive, we have no idea what the areas of focus should be if we were to embark on a more comprehensive wellness program	1	2	3	4	5	6	7	8	9	10	We are very clear regarding our populations health tendencies; therefore, we know what areas we should address as we embark on a more comprehensive wellness program
E	If we were to invest our efforts in a comprehensive wellness plan, we are not sure if our employees would participate. If they would, we are not certain about what would motivate them to change behaviors or habits	1	2	3	4	5	6	7	8	9	10	If we were to invest our efforts in a comprehensive wellness plan, we know most of our employees would participate and we know what would motivate them to change their behaviors or habits
F	Our systems, processes and technology are not integrated, automated or scalable	1	2	3	4	5	6	7	8	9	10	Our systems, processes and technology are integrated, automated and scalable
G	I am not sure about how to best communicate with our employees and their family members as we try to enable them with valuable and timely information	1	2	3	4	5	6	7	8	9	10	I have confidence that I know how best to communicate with our employees and their family members as we try to enable them with valuable and timely information
H	I am unsure about how our benefits package and contribution strategy compare to our industry peers, or to other companies in our region and of similar size	1	2	3	4	5	6	7	8	9	10	I have a good grasp on how our benefit package and contribution strategy compare to our industry peers, and to other companies in our region and of similar size
I	We do not have a clear metrics for measuring performance, progress and return on our investment as it relates to our benefit plan expenditure	1	2	3	4	5	6	7	8	9	10	We have a clear metrics for measuring performance, progress and return on our investment as it relates to our benefit plan expenditure
J	From an HR perspective, it would be valuable to have a dedicated professional to contact for support (research, projects, confirmation)	1	2	3	4	5	6	7	8	9	10	We have all of the HR support we need internally or through some external, quick to access source
K	We have not established a well thought out road map and timeline in terms of how our benefits will look in 3-5 years	1	2	3	4	5	6	7	8	9	10	We have given a lot of dedicated thought and attention to how our benefits will look in 3-5 years and we have a clearly defined benefits strategy outlined to achieve these goals
L	Our annual renewal process is reactive and causes anxiety, confusion and frustration	1	2	3	4	5	6	7	8	9	10	Our annual renewal process is proactive, orderly, simple and satisfying

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>> CONFIDENTIAL QUESTIONNAIRE

4. What progress have you already made towards realizing your goals?

- strategy to educate employees on benefits

5. What roadblocks stand in your way to achieving your goals listed in question 3?

roadmap

resources + time

6. What are the most important actions you must take to overcome the roadblocks listed in question 5?

creation of roadmap w/ expertise

finish 2017 goals + place in 2018 goals